

STATE OF TENNESSEE
IN THE PROBATE COURT OF SHELBY COUNTY

IN THE MATTER OF THE
GUARDIANSHIP/CONSERVATORSHIP

OF _____ NO. _____

Minor/Disabled Person

Fiduciary

PROPERTY MANAGEMENT PLAN

Pursuant to Tennessee Code Annotated Sec. J34-11-115, the undersigned guardian or conservator submits the following proposed Property Management Plan: (Check one of the following)

_____ All assets held by the undersigned for the ward will be invested in accounts or certificates of deposit fully insured by an agency of the federal government. All such investments shall be in financial institutions located in Shelby County, Tennessee.

OR

_____ Investments are to be made other than as stated above:

It is understood that the purpose of this Property Management Plan is to advise the Court of the general type of property in which the ward’s property will be invested so that the Court will be assured the guardian or conservator will be making approved investments. It is understood that the undersigned must request **Court Approval** to change the nature of investments to be made.

This _____ day of _____, _____.

Guardian / Conservator